

CHARTING OUR FUTURE:

**A REPORT OF THE NORTH CAROLINA
STATE HISTORICAL RECORDS ADVISORY BOARD
JANUARY 2002**

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CHARTING OUR FUTURE: **INTRODUCTION**

On Friday, November 2, 2001, the North Carolina State Historical Records Advisory Board (SHRAB), supported by a grant from the National Historical Publications and Records Commission, hosted a statewide conference on records at the Jane McKimmon Center on the campus of North Carolina State University. Attended by over 120 representatives of various archival, library, museum, historical, and academic institutions from around the state, *Charting Our Future* was a watershed event for records keeping in North Carolina.

In early 1993 the North Carolina SHRAB published *To Secure Our Legacy: The Future of North Carolina's Documentary Heritage*, a comprehensive report outlining an ambitious agenda of action for the state's archival and records community. As part of the SHRAB's program grant for the years 2000-2002, the board decided to sponsor a statewide conference to assist in preparing an updated report, redefining the issues facing records holding institutions, and identifying and recommending actions to meet the challenges that confront these institutions at the beginning of the twenty-first century.

A comprehensive survey of records holding organizations was prepared and sent to well over 400 recipients during the year 2000; some 227 responses were received and tabulated. With this information available to participants, the statewide conference was held on November 2. A cable program featuring a discussion of resource allocation was telecast the night before the conference.

John Carlin, the Archivist of the United States, offered the keynote address. Following his remarks, panelists addressed five major topics: electronic records, digitization, funding and resource development, staff education and training, and preservation. During afternoon break-out sessions participants formulated recommendations. These recommendations will be submitted to the SHRAB as it commences a new grant cycle for 2002 to 2004, and will form the basis for planning as the board develops initiatives for future records initiatives in North Carolina.

The following sections describe in detail the work of the SHRAB and the deliberations and actions of *Charting Our Future*. It is the hope of the SHRAB that the recommendations formulated at the conference will indeed assist the board and the archival and records community of North Carolina to "chart our future" during the first decade of the twenty-first century.

Jeffrey J. Crow,
State Coordinator
State Historical Records Advisory Board
January 2002

PART I

CHARTING OUR FUTURE: THE BACKGROUND

I. The Decision to Update *To Secure Our Legacy*:

On November 2, 2001, the North Carolina State Historical Records Advisory Board (SHRAB) held *Charting Our Future: The Statewide Conference on Records* at the Jane McKimmon Center on the campus of North Carolina State University. Over 120 representatives of archival, museum, library, academic, government, and historical organizations attended this day-long meeting, united by the desire to address major issues and challenges that confront records keepers throughout North Carolina and to explore avenues to meet those challenges. The presentations made by speakers at *Charting Our Future*, and the recommendations formulated by participants during the afternoon sessions of the conference, form the centerpiece of this needs/assessment report, which is offered to the citizens of North Carolina and to the National Historical Publications and Records Commission (NHPRC) in compliance with a grant from the NHPRC.

Charting Our Future was nearly two years in planning. In 1999 the SHRAB decided the time had come to update its 1993 needs/assessment planning document *To Secure Our Legacy: The Future of North Carolina's Documentary Heritage*. In the seven short years since its publication, there had been spectacular advances and changes in electronic technologies, including the multiplication of electronic media and resultant preservation issues. In addition, the increasingly difficult task of securing records funding, and the desire to explore additional means of support, convinced the board that a planning update for North Carolina was necessary. Accordingly, the board submitted a proposal for a needs/assessment process that would lead to a statewide conference on records in early November 2001. The NHPRC accepted this proposal, and in the spring of 2000 the board began planning in earnest for the conference.

II. Survey of Records Repositories:

A primary instrument of this process would be a survey of the state's records keeping institutions and organizations. On August 4, 2000, the SHRAB sent to some 400 institutional representatives its prepared Survey of Records Repositories, which was created not only to measure and evaluate traditional problems and issues confronting archivists, local government officials, and librarians, but also to include a number of queries concerning information technology (IT) issues. Over the next few months 227 institutions and organizations from across North Carolina responded to the survey; these results were tabulated using Microsoft Access and eventually were made available to all participants in *Charting Our Future* and are included in this report [see Appendix B].

The results of the SHRAB survey revealed that while progress had been achieved since the publication of *To Secure Our Legacy*, much work remained to be done to bring the Tar Heel State's repositories into the twenty-first century. While some institutions were adjusting to the "electronic age" and implementing programs to digitize some of their collections and make them available to the public, other organizations remained years behind. Staffing issues, financial problems, and space considerations continued to plague most respondents, while a whole new set of questions relating to IT issues now confronted records keepers---electronic records lifecycles, needed standards of practice, interoperability, digitization, and staff (re)training, to name but a few.

Of the 227 institutions responding, 158 had professional staff employed; the remainder depended on unpaid and volunteer nonprofessionals. Only a quarter of the organizations and institutions had annual budgets of over \$100,000; nearly a quarter had yearly budgets of less than \$1,000. Only about 40 percent of respondents had designated stack areas for maintaining

collections and records, while 42 percent offered researchers limited electronic access to their holdings. Approximately one-third of the institutions reporting had experienced either document loss, environmental problems, or natural disasters of some kind during the past four years.

The results of the survey confirmed the need for *Charting Our Future* and a new planning document for the SHRAB. The agreement by the Archivist of the United States, Governor John Carlin, to deliver the conference keynote address emphasized the importance the conference would have in setting a new agenda for records keeping and preservation in North Carolina.

III. Consultancies on Electronic Records and Digitization:

The SHRAB proposal approved by the NHPRC provided that five major topics would be examined by the survey and by the planned statewide conference: electronic records, digitization issues, funding and resource development, staff education and training, and traditional preservation issues. In addition to the support requested by the board, the NHPRC also granted the SHRAB additional funding to acquire the services of two consultants to work with the board, participate in the statewide conference as speakers, and appear on two cablevision programs dedicated to electronic records issues and to document digitization concerns. These programs were broadcast over the North Carolina Agency for Public Telecommunications (APT) public service network; APT's programs reach over 90 percent of North Carolina's citizens.

The cable program on digitization was telecast on October 23, 2001, and featured digitization consultant Kevin Cherry of the State Library of North Carolina and director of the NC ECHO (Exploring Cultural Heritage Online) Project, along with Paul Conway of Duke University, and Druscilla Simpson, head of the Information Technology Branch of the Archives and Records Section of the Division of Historical Resources. A second program, on electronic records, was aired on December 4, 2001, and featured electronic records consultant Alan Kowlowitz of the New York State Office for Technology, Dr. Helen Tibbo of the University of North Carolina at Chapel Hill School of Information and Library Sciences, and David Mitchell, head of the Government Records Branch in the Division of Historical Resources. Report summaries by consultants are included as appendices to this document [see Appendix F].

IV. The Allocators' Program:

Another component of the board's updating/assessment process was the broadcast via the APT cable network of a resource allocators' program on November 1, 2001, the evening before the statewide conference, to examine funding and resource allocation and explore means of leveraging support from local and state sources. Gail O'Brien, associate dean of the North Carolina State University College of Humanities and Social Sciences and member of the North Carolina Historical Commission; David Olson, director of the Division of Historical Resources of the Department of Cultural Resources; and Camille Patterson, fundraising consultant, discussed funding issues and the need to appeal to more diverse financial sources and broader audiences, both on a state and local level. Many of the insights aired in that program were examined in greater detail at the statewide conference and incorporated in its final recommendations.

V. The Conference:

Deputy Secretary for Archives and History Dr. Jeffrey J. Crow convoked *Charting Our Future* at 9:00 A.M. Friday, November 2, 2001. Representatives of a broad variety of records keeping institutions and organizations attended, including registers of deeds, museum curators, university archivists and librarians, and state government officials [see Appendix D]. After the keynote address by Governor Carlin, a morning plenary session gave attendees the opportunity to hear the five major conference topics addressed in succession [see Part II: *Charting Our Future: The Morning Session*].

After a conference luncheon, former director of the North Carolina Division of Archives and History and professor of history at Meredith College, Dr. William S. Price, spoke about earlier generations of archival leaders in the southeastern United States and called upon participants to recapture the pioneering spirit that motivated these individuals. In particular Dr. Price recalled the immense contributions to the archival profession by such giants as Christopher Crittenden of North Carolina and Charles Lee of South Carolina.

The first part of the afternoon was dedicated to break-out discussion sessions where recommendations for future action were formulated by participants. The break-out sessions were followed by the afternoon plenary session where these recommendations were presented to the full conference by reporters from each of the five sessions. Recommendations presented to the conference form an essential portion of this report [see Part III: *Charting Our Future: Recommendations of Break-Out Sessions*].

Before adjourning, David J. Olson, director of the Division of Historical Resources, summarized conference proceedings and recommendations. As North Carolina state archivist from 1981 until 2000, he had been intimately involved in the SHRAB needs/assessment planning reports of 1983 and 1993, and he reflected on the changes and progress that had been made during the past twenty years. In 2000, with NHPRC encouragement and direction, the North Carolina SHRAB had undertaken to review the state of affairs in records keeping in the state and chart a course for the future. With critical support from the NHPRC, the SHRAB and representatives from institutions across the state had come together to examine issues that faced them all. Major topics, such as the increasing importance of electronic records and diversified funding strategies, had been explored. Institutional partnering, staff education, and space considerations continued to be significant concerns. Strategic planning was absolutely necessary, and cooperation and collaboration among and between institutions was no longer optional. The recommendations adopted at *Charting Our Future* would give direction to the SHRAB and the records community in North Carolina for years to come. Echoing Governor Carlin, David Olson urged conference participants to consider *Charting Our Future* as a beginning--a moment when the state's records community would come together as one in its dedication to meet the challenges that lie ahead.

PART II:

CHARTING OUR FUTURE: THE MORNING SESSIONS

I. The Keynote Address: The Honorable John Carlin:

Charting Our Future: The Statewide Conference on Records commenced with a significant keynote address delivered by the Archivist of the United States, the Honorable John Carlin. Governor Carlin's remarks, made a month and a half after the September 11, 2001, terrorist attacks on the United States, stressed the renewed importance that the historical record plays in defining the existence and character of the United States. He enumerated serious challenges that confront the archival profession in the twenty-first century, some very familiar, others of more recent origin. Traditional concerns such as lack of space, finances, and staffing continue to be important; but in the twenty-first century, issues relating to rapidly transforming electronic records technology, the role of government as resource provider and administrator, public access questions, and the increased desirability for public/private partnerships for leveraging institutional support are taking center stage.

Governor Carlin stressed the importance of and need for education and re-education, not just of institutional staffs, but of the public. The increased importance of records keepers in our society in these critical times offers the archival profession an opportunity to present its case more convincingly. Even with the complex and difficult challenges confronting archivists, records keepers, librarians, administrators, and others charged with the safekeeping of our nation's documentary heritage, opportunities exist—in partnerships with the private sector, in educational initiatives, and in working with different levels of government. The old image of the dusty archives with an archivist carefully separating valuable materials from "archival trash," while not ceasing to be valid, must better reflect modern responsibilities and tasks. Archivists and records managers are the veritable keepers of the lifeblood of our history. In the twenty-first century this role must be emphasized and acknowledged, for it is what ensures that our nation will survive as the free and independent republic it was intended to be.

II. The Morning Plenary Session:

The morning plenary session offered presentations by experts in the five areas of major concern: electronic records, digitization, funding and resource development, staff education and enhancement, and traditional records preservation. The five speakers were: **Alan Kowlowitz**, program analyst with the New York State Office for Technology and formerly with the New York State Archives, on electronic records; **Kevin Cherry** of the State Library of North Carolina and program director of the NC ECHO Project (Exploring Cultural Heritage Online), on issues in digitization; **Camille Patterson** of Raleigh, North Carolina, a financial resources consultant, speaking on funding and resource development; **Dr. Helen Tibbo** of the School of Information and Library Sciences at the University of North Carolina at Chapel Hill, on staff education and development; and **Harlan Greene** of the Charleston (S.C.) Public Library and former head of the North Carolina Preservation Consortium, on continuing preservation issues.

1) Electronic Records: The Challenge and Opportunity of the Inevitable:

Alan Kowlowitz spoke on the topic, "Electronic Records: The Challenge and Opportunity of the Inevitable," highlighting the growing importance of electronic technology in government operations and the resultant management and records preservation issues. The increased application of information technology (IT) in the public sector over the past decade has occurred in a context of declining resources and rising public frustration with government in general. IT has

been seen by many as a means of creating cheaper, faster, and more efficient government; but this solution poses a number of questions that have not been fully addressed. The application of IT to government creates new layers of electronic records with increasingly complex formats, manual processes do not disappear, and paper and microform records continue to accumulate. Records keepers are challenged by the increased decentralization in electronic records management, by the great diversity of electronic records, and by rapid technological change.

Kowlowitz summarized long-term trends in information technology and electronic records creation in the following chart:

| Trend | Technologies | E-Records |
|--|----------------------------|---|
| Data processing (1960-1980s) | Mainframe computer | Data files, databases |
| Office Automation (1980s-1990s) | PCs, Local networks | Office documents (word processed, spreadsheet), internal e-mail |
| Electronic government (late 1990s-2000s) | Internet, WWW, multi-media | Online transactions, digitally signed, multimedia |

Electronic government--the transacting of government business online--is having a significant effect on records keeping. Since the 1990s various federal and state laws have been enacted to affirm the legal status of electronic records and their comparability with paper/handwritten ones. North Carolina enacted an E-Commerce Act in 1998, affirming the legal use of electronic signatures in government documents; the North Carolina Uniform Electronic Transactions Act (UETA) of 2000 authorized the use of electronic records and signatures in private transactions. On the national level, the Federal Electronic Signatures in Global Commerce Act (E-SIGN) guaranteed the use of electronic records and electronic signatures in interstate commerce.

The growing importance of electronic records in government has affected areas such as contracting, government filings, and has had and will continue to have an enormous influence on the management and preservation of these records. Effectively managing electronic records raises a host of technical and organizational questions: electronic records are easy to create but difficult to manage and preserve; electronic media are more fragile than paper or microform media and periodically need to be refreshed (copied to new media); the technology employed needs to be upgraded every one to three years, in some cases sooner; to be fully accessible over time electronic records need to be migrated to newer technologies, which is frequently a costly and expensive process; the electronic records management process is more complex, requiring substantial pre-planning, an infrastructure of technology, financial support, and sufficient expertise (which, in turn, requires additional staff training or new staff).

Organizations need to develop effective electronic records management programs integrated into ongoing business and information management activities that encompass early intervention in record lifecycles, identifying and implementing management, retention, and access requirements, as well as migration plans that take into account the development of newer record systems. This will require changes in the behavior of those who create and manage most electronic records in the office environment. Organizations must reassume control of organizational information resources while allowing employees to retain flexibility and control of their own virtual workspaces. Proper document management software can reduce human intervention and automate information and records management activities.

Organizational change will require staff re-education to develop the skills to manage electronic records; and management responsibilities will need to be distributed between records creators, custodians, technical units, and users. Institutions that previously dealt almost exclusively with paper records (at the back end of the records lifecycle) and that lack the staff, expertise, and resources, may wish to consider ongoing partnerships and resource sharing with organizations stronger in IT capabilities. Lastly, institutional resource allocators will need to direct more resources toward electronic records management--certainly a difficult issue, especially for cultural

institutions that already have limited resources. Redirecting resources also may mean abandoning some traditional tasks for more risky propositions.

Despite the inherent difficulties, recent trends in government also provide opportunities for records repositories and institutions. Both federal and state governments have ongoing major initiatives. In North Carolina "NC@your service" is considered one of the better electronic government web sites in the United States. North Carolina's electronic procurement program now addresses electronic records retention and audit issues on its web site. Records institutions across the state are in a position to link electronic records preservation and management to electronic government issues and to use this linkage as the basis to build the partnerships necessary to address electronic records issues.

2) Issues in Digitization: North Carolina and Beyond:

Increasingly, digitization of records is seen as a cure-all solution to solving the problem of offering information on the Internet. Kevin Cherry, of the State Library of North Carolina and director of the North Carolina ECHO Project (Exploring Cultural Heritage Online) to survey and make accessible online this state's rich cultural, historical, and documentary heritage, addressed this question in his presentation "Issues in Digitization: North Carolina and Beyond." Utilizing the image of students searching the Internet for information and being shocked to find that not *all* data has been made available, he began by discussing the extremely high level of expectations that users now have. These expectations cannot be fully met in current circumstances; indeed, even with great infusions of time, staffing, and financial resources, the growing demand for online information far outstrips society's present capabilities. Nevertheless, many of these demands *must* be met. Understanding digitization's potential and pitfalls, then, is a primary task of records keepers.

There are three major considerations, or "planks," that archivists, librarians, and other records managers need to keep paramount as they initiate digitization projects:

- **Digitization is more than scanning:**

Scanning images is not all there is to digitization. Digitization involves an informational and delivery framework in which scanned images are made accessible, and in which they are arranged, described, and catalogued. It is these "access points" that enable digitized images to actually become useful; it is this descriptive information that we can term "metadata," which in a real sense is data *about* data.

- **Digitization builds on traditional access and preservation techniques--it does not replace them:**

Cherry emphasized that digitization does not replace all the traditional practices of archivists, records managers, or librarians. "Computers help us serve our constituencies every day in ways that early librarians and archivists would have had a difficult time imagining, but computers replace very little of the traditional work of access and preservation, work that must take place before we run the scanners." Arranging, describing, and cataloguing must continue; they are prerequisites for scanning and eventual digitization. In this sense digitization is "add-on" labor--additional activity that an institution with a digitization initiative must provide through continued support of various labor-intensive traditional records activities.

- **Digitization results in a product that must be proactively maintained:**

An organization's digitization effort requires pre-planning and the ability to ensure long-term management. There is no such thing as benign neglect with digital information. Creating a digital record commits an institution to the preservation of that information, and this implies the assurance that the storage media are stable and that the data be migrated into newer types of hardware and software as needed. Without this commitment by an institution, digitization projects will not be successful.

Digitization is "transformative," that is, potentially enabling the creator and user of digital files to accomplish things hitherto impossible with the original media: increasing the size of the images, incorporating them into other types of media, grouping remote items together, creating

virtual collections, and rejoining or reuniting separated collections. Indeed, the possibilities are almost limitless.

- **In North Carolina:**

Many institutions in North Carolina have recognized the great promise of digital technology. More than 130 digital collections have been mounted on the World Wide Web by this state's archives, museums, and libraries. Among other activities, the North Carolina State Archives is digitizing its Secretary of State Wills and Estates Collection, a primary source for genealogical research; and the University of North Carolina at Chapel Hill will be digitizing materials held in its impressive North Carolina Collection. Other institutions--libraries, colleges, and museums--are mounting other collections, especially those that attract considerable public interest (e.g., genealogical collections).

- **NC ECHO:**

To bring these initiatives together in a cooperative, statewide effort, the North Carolina ECHO Project--Exploring Cultural Heritage Online [www.ncecho.org]-was created. NC ECHO seeks to assess in depth this state's cultural resources and institutions, offer continuing education opportunities, and provide standards identification and assistance to organizations that need it. NC ECHO is a web portal to online resources mounted by North Carolina's archives, libraries, and museums.

NC ECHO counts more than 750 "partners" across the state committed to addressing the three "planks" of digitization. Because these partners understand that digitization is more than scanning, a primary objective is the creation of a set of standards for delivering metadata, or "online cataloguing," for digitally created electronic files. Tools are being developed that will assist NC ECHO partners in performing that necessary cataloguing.

Because NC ECHO constituents understand that digitization builds on traditional access and preservation practices, its grant initiatives, workshops, and publications emphasize and insist on this prerequisite before any digitization effort is mounted.

Because collaborators in this effort comprehend that digitized records must be proactively managed and maintained, NC ECHO promotes what is termed "Scan Once" methodology, whereby high resolution "master" images are created which can be utilized in a variety of ways. Accompanying those master images is "administrative metadata," or the information required to actually use the stored images. Finally, because of the desire to ensure the long-term value and usefulness of digital records and the information they convey, proprietary systems are discouraged.

For NC ECHO digitization means more than "access"; it also involves as well uniting broken records collections, creating virtual records collections, comparing holdings, and greater contextualization of primary sources for specific audiences, whether for fourth grade history classes or senior citizens.

The challenges of digitization are enormous, but the appropriate response to these challenges can open new vistas and offer unparalleled opportunities to North Carolina's record community.

2) Fundraising and Resource Development: A View from the Dugout:

Institutional funding and resource allocation are constant issues for records keeping organizations. Camille Patterson, financial resources development consultant, entitled her remarks "Fundraising and Resource Development: A View from the Dugout," an overview of fundraising questions. In her presentation she suggested means for records keeping institutions to leverage and enhance resources through private support. She discussed three items that need preliminary examination:

- **Where does private funding support come from?**

Private giving in the United States comes from four sources: individual contributions, foundation support, corporate giving, and bequests. In 2000 total charitable giving in the nation was estimated at \$203 billion (a 6.5% increase over 1999):

- (1) Individual (personal) giving accounts for 75% (\$152 billion) of all giving.
- (2) Non-corporate foundation giving accounts for approximately 12% (\$24.5 billion). This amount was up almost 20% over fiscal year 2000 as a result of the increased value of foundation assets and a higher number of grants awarded.
- (3) Corporation giving increased about 12% (\$11 billion) over 1999, but is still only 1.2% of pretax income.
- (4) Bequests rose about 2.5% (\$16 billion) from 1999 to 2000. Bequest giving varies depending on the death rate and the time of will probate.

- **Where do the funds go?**

Contributions from individuals, foundations, corporations, and through bequests are distributed, as of the year 2000, as follows: religious causes (74.3%), education (28.1%) [Overall this year shows a slowdown, depending on type of institution surveyed and the fiscal year vs. calendar year], health areas (18%), human services (18%), arts, culture, humanities (11.5%) [Giving increased by almost 4% for the second year in a row in these areas], and public/society benefit (11.5%). [Statistics from *Giving, USA*, 2000 data, latest year available.]

- **Initiating a funding effort--questions to ask at the beginning:**

An organization that wishes to seek private funding support outside its regular budget should address five questions:

- (1) **What exactly is to be funded and why? What are the elements of the project, how will it work, how will it be implemented?** What will be different, improved, safer, easier to use, better preserved, or more accessible, once the project is completed?
- (2) **How much does it cost?** Can the projected costs be justified and are they accurate? Has appropriate overhead been included in the projected budget without inflating costs? Can the projected budget be explained in simple numbers and language to potential donors?
- (3) **Who will be the driving force behind the fundraising initiative?** Who will provide the leadership for the effort? Who will be the spokesperson, sign the support letters, and make the presentations to potential donors?
- (4) **What happens if the project does not get funded?** If the proposal does not receive funding what would happen, what would be lost, and what opportunities would be missed? Would the organization continue its campaign and regroup for future efforts? Do alternative strategies exist?
- (5) **What happens if the project does receive support?** Would the applicant institution be prepared to begin the project immediately after receiving an award or grant? Is a timeline prepared so that progress could be demonstrated on a reasonable schedule?

Successful funding and resource development campaigns need to understand that:

- Fundraising is about building and utilizing relationships and discovering who supports the goals and objectives of an organization--it is about who genuinely cares about these goals in the community. Can strong relationships be established that will be capable of assisting the project?
- Fundraising is a process, not an event.
- Fundraising is about believing in the mission of the applicant organization and a willingness to take that message to potential donors.
- Fundraising is "as American as baseball." When representatives of an organization are involved in fundraising, they are asking others to care about the financial health of the institution's project and to work to make something new or good happen.
- True fundraising, at its very core, means helping people express a meaningful choice over the direction in which our society will progress.
- When campaign consultants agree to manage a capital or major gift campaign for an organization, there are four critical readiness issues that they identify and "grade" an organization on: **needs, volunteer leadership, internal systems, and visibility.**

(1) What are the organization's needs? Can they be defined? What will they cost? If support is forthcoming, could action be initiated quickly and results produced in a timely manner? (2) Who are community leaders in an area that might be supportive or take an interest in leading a funding campaign? (3) How good is the organization's record keeping? (4) What thought and planning have been given to public relations outreach efforts? Campaign consultants assess an organization's visibility by asking key people specific questions. These include: What is the overall impression given by the organization? Is the governing board strong, average, or weak? What is the impression of the programs and services provided by the organization? Have there been other funding development campaigns? How would the organization and its objectives rank in a list of community priorities? Is its campaign for support realistic? Is the goal attainable? Where would the major contributions come from? What would be the major obstacles? Who are potential leaders to be approached?

As institutions turn more to the private sector for support, these questions need to be addressed and answers found.

3) Staff Development as Asset Management in the Twenty-First-Century Repository:

Dr. Helen Tibbo of the University of North Carolina at Chapel Hill School of Information and Library Science addressed the topic "Staff Development as Asset Management in the Twenty-First-Century Repository." One of the current buzzwords in the digital domain is "asset management." Curators of cultural and organizational records now conceptualize their collections in terms of being cultural and knowledge-based "assets" rather than just "holdings." It is important to envision staff as "assets" and the term "staff development" as the most important type of "asset management," because well-trained, engaged employees are the most valuable components of any repository. Accordingly, staff development needs to be seen in terms of an institution's mission and resultant benefits, and not merely in terms of its costs.

In all institutions, large and small, success depends on staff and their ability to skillfully manage and employ technology as a tool in service to scholarship, organizational memory, and cultural heritage. Staff must build technological solutions on time-tested practices, while laying the foundation for new theoretical constructs in areas such as record authentication and information technology (IT). In order to move repositories into the IT era, a highly skilled, flexible, creative, dedicated, and intelligent workforce is a necessity. A strategy for building and maintaining a well-educated, competent, and flexible workforce is needed, and staff must be seen as an institution's most valuable asset.

There are two major steps in managing staff as an asset:

(1) Asset Management Step 1 – Hiring for the Team:

In filling positions in an organization, employees with the qualities of intelligence, curiosity, creativity, flexibility, problem-solving ability, loyalty and dedication, attention to detail and quality, and a strong service orientation should be employed. New hires offer an opportunity to reshape human resources and the collective skills and aptitudes of a staff. New staff should be hired not just to do particular outlined tasks, but to become part of the repository's working team and for what they can bring to their co-workers. Ideally, each employee will have different skills that fit together in a collective whole greater than the sum of its parts. In order for this to happen an institution's directors, search committees, and even entire staffs through strategic planning, must be able to appreciate new colleagues who are different in background and training from current employees. In today's world educational and cognitive diversity are significant factors in reaching broader and more varied constituencies and in dealing with a greater diversity of information and collected materials.

To accomplish these goals, new employees should possess educational attributes that may differ from the training that many senior employees experienced. New staffers will exhibit more IT skills. Love of documents alone will no longer suffice in hiring decisions.

(2) Asset Management Step 2 – Existing Staff Development:

Beyond hiring new staff, the single most important element in any staff development program is senior administrative support. Institutional resource allocators should view the repository as a

learning organization where continuing education for existing professional staffers is an essential ingredient in the institution's program. This support is essential for two reasons: 1) significant staff development is costly, thus there must be a financial commitment to it from the top; and 2) life-long professional employee learning requires senior leadership. Administrators must set the tone and expectation that all employees will continue their professional education throughout their careers. Administrative support will validate the importance given to learning and the need to fit new skills into the organizational framework.

Staff development, especially continuing education, is most effective in providing employees with new knowledge, skills, and understanding. Continuing education for archivists is paramount in a rapidly changing environment. Respondents to the North Carolina SHRAP's Survey of Records Repositories (2000) stressed that continuing education is needed in a wide variety of areas, including:

- 66% in archival methods.
- 69% in technology/computers.
- 49% in appraisal and collection development.
- 74% in preservation.
- 65% in disaster preparedness.

More generally, areas for continuing education may be grouped in terms of materials (arrangement, description, preservation, and access); users (user studies, user education, interacting with users); processes (technology, workflow, security, etc.); and management (fund raising, grant writing, donor relations, leadership, staff conduct).

Vehicles for Staff Development:

There are numerous vehicles for staff development, including organized staff discussions, guest speaker programs, workshops, and full graduate-level courses:

- Peer mentoring.
- Formal and informal staff meetings to discuss issues and professional literature.
- Networking with local, regional, or topical colleagues.
- Attending state and regional conferences.
- Reporting back from conferences.

At a somewhat higher cost are:

- Supporting staff who wish to conduct research that will promote the profession and their respective institutions.
- Supporting staff who wish to attend workshops and other continuing education opportunities.
- Supporting staff who wish to take graduate-level courses.

More expensive options include:

- Supporting staff who wish to attend national conferences and serve in national organizations.
- Bringing in guest speakers and consultants to work with staff on issues, skills, and continuing education.

Where to Turn for Continuing Education--with Examples:

- **Universities:**

- UNC-CH School of Information & Library Science.

- <http://www.ils.unc.edu/>

- NCSU Public History Program.

- <http://www.ncsu.edu/chass/history/NC>

- UVA Rare Books School.

- <http://www.virginia.edu/oldbooks/>

- Cornell Library's Dept. of Conservation & Preservation.

- <http://www.library.cornell.edu/preservation/>

- **State Agencies:**

- NC Department of Cultural Resources.

- <http://www.ncdcr.gov/>

NC ECHO.

– www.ncecho.org

Colorado Digitization Project.

– <http://coloradodigital.coalliance.org/>

- **National, Regional, and State Professional Organizations:**

Society of North Carolina Archivists.

– <http://www.ncarchivists.org/>

Mid-Atlantic Regional Archives Conference.

– <http://www.lib.umd.edu/MARAC/marac-hp.htm>

Society of American Archivists.

– <http://www.archivists.org>

ARMA.

– <http://www.arma.org>

AAM.

– <http://www.aam-us.org/>

- **National "Private" Organizations:**

Northeast Document Conservation Center (NEDCC)

– *School for Scanning & digitization guidelines.*

– <http://www.nedcc.org>

Research Libraries Group (RLG)

– www.rlg.org

OCLC

– www.oclc.org

The Getty Information Institute.

– <http://www.getty.edu/research/institute/standards/>

- **International Organizations:**

NINCH. National Initiative for a Networked Cultural Heritage.

– <http://www.ninch.org>.

JISC. Joint Information Systems Committee. UK.

– <http://www.jisc.ac.uk>.

PADI. Preserving Access to Digital Information.

– <http://www.nla.gov.au/padi/>.

- **The Literature.**

- **The World Wide Web.**

Records keeping institutions and repositories expend great resources to develop collections, create them, preserve them, and make them accessible. Time and resources need to be invested in an even more valuable asset--the individuals who make programs and institutions possible.

4) **The Preservation Universe:**

Harlan Greene, of the Charleston (S.C.) Public Library and former director of the North Carolina Preservation Consortium, began his presentation by invoking the analogy between the modern archivist and the television evangelist. Like the evangelist, the archivist/records manager has as his or her goal the preservation of the "soul" of the historical record, to make it, if not eternal, at least eventually accessible for the longest period of time. His battle is against the "devils" of destruction, negligence, and unconcern. The information the archivist preserves may be timeless and critical to the survival of our republic, but the media for that preservation is often transitory or transient. Paper (especially if it is acidic), silver film, magnetic media, and other such formats are limited by time and preservation practices. The records professional's task is even more challenging than the evangelist's, for the archivist and records manager have to see to the

survival of not just the "soul" (the information) but also the "flesh" (the physical carrier of the information).

Newer electronic technologies have complicated the task of the archivist, but have not altered his mission. "We may love the paper copies of the old letters bearing the names of those who have made North Carolina famous--but there is a lot of data in e-mail files in our government offices" that now requires preservation as well. Technology may have altered the range of documents and preservation techniques, but the essential mission remains the same.

Moreover, the paper document has not gone away. The effects of the electronic revolution have actually increased the amount of paper to be dealt with, posing additional questions of scheduling, retention, arrangement and description, and conservation. There was perhaps a time in the not-so-distant past when archivists and records keepers were told that new technologies would lessen the work related to traditional paper-based archives, but this is not happening, at least not yet. While technology is not the tempter in a new "garden of Eden," it is neither the solution many assumed it would be, for all records materials are subject to deterioration.

Another major concern is the changing view that society takes of itself and the resultant need to preserve records today that perhaps were once not considered important to our history. Greene cited as an example the copper slave badges worn by slaves that were hired out by their masters in antebellum Charleston, South Carolina. Once not considered that significant and usually discarded, today the badges are seen as important in understanding the operation of slavery in the early and mid-nineteenth century. Most of the written records associated with them have not been preserved, and thus the history to be gleaned from them has not been "saved." The badges themselves endured because of the material they were composed of.

Despite the advancements in technology, the essential role of the archivist remains clear--he must attempt to save such segments of American history, for it is only through preserving such small portions (and other dissimilar items like them) that a more complete knowledge and understanding of the nation's heritage and culture may be gained. If the media change, the archivist must change and learn to use them, but he must never forget his mission---that does not change. Just as the evangelist's calling remains the same--by saving a human soul, the world is saved--so the records professional who saves the human record saves the world it documents.

PART III:

CHARTING OUR FUTURE:

RECOMMENDATIONS OF BREAK-OUT SESSIONS

Charting Our Future: The Statewide Conference on Records, held Friday, November 2, 2001, offered two levels of involvement to attendees. A morning plenary session enabled participants to hear from experts on five critical issues affecting stakeholders: electronic records, digitization, resource development, staff training, and records preservation. During the afternoon conference, attendees had the opportunity to actively discuss those issues in depth and formulate recommendations. These recommendations are offered to the North Carolina State Historical Records Advisory Board (SHRAB) as a basis for future planning and development.

Electronic Records: The Challenge and the Opportunity of the Inevitable

Alan Kowlowitz, Facilitator
David Mitchell, Recorder

This session focused on electronic records and included mainly participants from local governments (registers of deeds), municipal governments, universities, and state government. Participants discussed major barriers to proper management of electronic records, strategies for overcoming barriers, and recommendations for implementation.

Major Issues--Barriers to the Proper Management of Electronic Records:

- Difficulty in enforcing standards (and lack of standards) for electronic records creation and disposition at the office level.
- Lack of clear responsibility for managing the records at all phases of their life cycle.
- Lack of Information Technology (IT) involvement in the organization's electronic records management and preservation operations.
- Lack of resources for needed technological enhancements.
- Need for training and education of users and archival/records management communities.
- Technological issues: (1) the obsolescence of hardware and software; (2) the need to refresh and migrate data; (3) multiple formats to address; (4) determining who will have access to the records and to what degree access will be accorded (security issues).
- Legal issues.
- Fear of changing from traditional paper-based practices of managing and preserving records.
- No "silver bullet" exists to help users and managers control the huge volume of electronic records that exist.
- Changes in electronic technology are rapid, while solutions to the problems caused by or associated with it occur slowly.

Strategies to Overcome Barriers:

- Establishing a clear direction through the creation and evolution of standards.
- More involvement and direction from state government.
- Educational campaigns/programs to address electronic records issues and public records issues for government officials.

- Advocacy among users: sharing information and techniques between institutions.
- Surveying customers concerning needs.
- Promoting the use of records management application software.
- Including stakeholders outside the records community in discussions of issues.

Recommendations:

- Seek help from CIOs, IT professionals, and those with adequate resources—secure their involvement and assistance to persuade others to address these issues; encourage partnering and cross-discussion of strategies.
- Identify electronic records with the most potential benefit to the institution, the community, and the state: (1) narrowly define a scope for preserving electronic records; (2) rethink and redefine the philosophy of preserving electronic records to match resource levels.
- Seek input from users and stakeholders—often their particular demands guide the allocation of resources, such as when collections are converted for Internet access.
- Create relationships at state and local levels to identify shared resources and electronic government initiatives.
- Plan now for when resources and support become available.
- Examine and analyze small successes and results in order to advance to larger issues.

Issues in Digitization
Kevin Cherry, Facilitator
Druscie Simpson, Recorder

The session on digitization issues focused on four major areas of concern, problems associated with each of these issues, and recommendations to initiate a resolution of these issues.

Major Issues:

- Questions relating to non-standardization: (1) non-standardized materials intended for digitization--non-standardized finding aids or the lack of finding aids; (2) lack of controlled vocabularies or authority files; (3) concomitant lack of audio/visual digitization standards.
- Questions relating to metadata (which describes how, when, and by whom a particular set of data was collected and how data is formatted): (1) extraction of metadata and related conversion issues; (2) not enough metadata to identify the underlying structure of a record.
- Questions relating to proprietary systems and interoperability: (1) systems become obsolete rapidly; (2) the inability to convert easily from one system to another; (3) the inability to have one system "talk" to another system; (4) the necessity to invest in systems that are appropriate to an institution and its needs.
- Questions related to expectations of administrators and users: (1) both administrators and users expect digital images to be produced quickly and to be made accessible via the Internet; (2) institutional staff is already overextended by traditional workplace obligations.

Recommendations:

- Standardization and best practices: (1) establish levels of access for different types of materials; (2) create an available pool of consultants, or "on call experts"; (3) establish a cooperative framework between institutions in the state, especially for monitoring technological change; (4) work to develop standards for digitizing audio and video material.
- Metadata concerns: (1) adhere to existing guidelines and standards; (2) develop Web cataloguing tools; (3) adhere to traditional photo cataloguing standards; (4) establish partnerships/cooperative arrangements between larger, more affluent institutions and

smaller ones; (5) create a compendium of standardized metadata terminology, available on the Internet and in printed form for institutions and users.

- Proprietary systems and interoperability: (1) stakeholders should utilize existing organizations in the state and nationally (e.g., the SHRAB, Society of North Carolina Archivists, associations of county and municipal officials, the National Historical Publications and Records Commission, etc.) to be aware of various proprietary systems in use, characteristics of these systems, and interface capabilities, and to maximize available information pertaining to these systems; (2) organizations should ensure that pre-purchase agreements for proprietary systems are clear as to expectations, capabilities, and responsibilities; (3) institutions should consider establishing a "guidelines for purchase" before approaching system vendors; (4) open source software should be used where possible to avoid problems in interfacing; (5) adequate communication on system issues between users, staff, and administrators is requisite; (6) the targeted data should be protected by the organization from an eventual failure to interface properly.
- Expectations of administrators and users: (1) select a pilot project for digitization that both fits the mission and goals of the organization and is manageable financially and from a timeframe perspective; (2) define the target audience and its needs, the base community that would benefit from the project; (3) establish the means of communicating with the audience the significance and value of the project; (4) maintain careful records of the success of the project, which can be used to make a case for support of future endeavors.

Fundraising and Resource Development
Camille Patterson, Facilitator
Loren Schweninger, Recorder

Fifteen participants from mainly smaller institutions assembled for this break-out session. The session identified:

Major Issues:

- How and when should a non-profit corporation be created?
- What businesses and foundations should be approached to fund records management, newspaper conservation, storage space, museums, and other projects.
- Developing planning and needs assessments.

Recommendations:

- Institutions and organizations should evaluate their current financial condition, scope and range of activity, potential to utilize staff and supporters, plans and goals of the organization, and the existence of other institutions in the area with similar objectives before applying for non-profit status. Consultation with appropriate legal and tax experts is critical in completing this process
- Agencies mentioned as potential sources of funding included: the North Carolina Division of Travel and Tourism (for some museum projects), the Department of Cultural Resources for digital initiatives, and the National Historical Publications and Records Commission (NHPRC) at the National Archives for preservation. Sometimes banks (including Wachovia Bank in North Carolina) are willing to entertain proposals that affect their communities, but the person or group making a proposal should "do the necessary homework about what the bank contributes to and how to best present the specific request." The same is true when applying to other corporations. Individuals should try to find persons who "might be knowledgeable on a topic [and] who could advise an applicant about how to approach donors." Any group desiring to raise funds should also create a board of directors.
- Institutions considering applying for funding should develop appropriate planning and needs assessments for their organizations before beginning the funding support process.

Clear objectives and means to achieve those objectives should be outlined, and advocates should be thoroughly versed in the plans and needs of the applying institution.

Note: For information on private giving there is an excellent publication titled *North Carolina Giving* (Capital Resource Development, 1999) that lists foundations by name, size, board members, and how to write an application. There is also *The Foundation Directory* which breaks down giving by categories. There are community foundations in a number of towns and cities (e.g., Greater Greensboro Foundation; North Carolina Community Foundation, in Sylva; Western North Carolina Community Foundation, in Asheville). These organizations could be approached regarding support for preservation and other records management projects.

Staff Development in the Twenty-first Century Repository

Timothy Pyatt, Facilitator

Benjamin Speller, Recorder

This session considered issues relating to staff development, support, and continuing education. Rapid technological change and increased demands for services from institutional staff have created or reinforced workforce expectations and pressures. The session identified:

Major Issues:

- More work to be accomplished in less time.
- Financial constraints--fewer dollars.
- Need for continual staff training in newer technologies.
- Increased use of records.
- Effects of new technologies on access methods.
- Continuous need for contingency planning and the effects of redundancy.

These transformations and changes in the archival and records management professions have created the need for new models for problem solving and decision making. Imagination, creativity, and flexibility are now required of personnel, whether paid or volunteer, to be effective in meeting the expectations of their constituencies. Staff development is now a critical necessity if the archival and records management professions intend to meet the challenge of what their stakeholders and users expect.

Recommendations:

Based on formal presentations and discussions from participants, archival and records management leaders should:

- Embrace the idea of staff as assets or human capital resources.
- Create a climate where both formal and informal staff development can occur in an effective and cost-efficient manner (e.g., continuing education opportunities, special courses and seminars, attendance at conferences, use of professional publications).
- Use the Internet as a mechanism for staff education and information.
- Encourage experienced professionals to be educators, mentors, and information consultants to other institutions.

The Preservation Universe

Harlan Greene, Facilitator

Rhoda Channing, Recorder

Represented in this session were some twenty participants from church libraries, registers of deeds offices, museums, public libraries, universities, the Office of Archives and History, and from various special collections.

Major Issues:

- The need for a wide range of information and assistance.
- Lack of interest and/or support from resources allocators or communities.
- Inadequate funding, not only for new initiatives, but to maintain current program levels of activity.
- Reformatting and migration of written and printed data to other formats (including questions about the use of microfilm, film, and digitization).

Recommendations:

- Information and assistance: (1) stakeholders must contact organizations in the state and region that can provide information and assistance, workshops, and continuing education opportunities. Such organizations include: the Federation of North Carolina Historical Societies, the Society of North Carolina Archivists, the Office of Archives and History, the North Carolina Preservation Consortium, the Association of Records Managers, and the South Eastern Library Network; (2) institutions should approach potential archival/records consultants available in the state. The State Historical Records Advisory Board offered program consultancies in an earlier regrant initiative (1996-1999). Such potential "experts" should be identified and a list, with areas of expertise, circulated on various listservs (e.g., Society of North Carolina Archivists, local governments, and so on); (3) the Internet should be utilized to collect and organize valuable information. Various institutions that offer assistance have very helpful websites. There is a wealth of current preservation literature supplied by the Library of Congress, the National Archives, and various state SHRAB sites; (4) participants expressed the hope that the SHRAB would offer in the future another regrant program, similar to the one offered from 1996 to 1999, to support local preservation efforts; (5) state and regional archival/records organizations should consider a cooperative effort to combine informational outreach efforts, perhaps dividing up communities in the state that need information and devising a means to reach them with relevant material; (6) a state website could be established, perhaps hosted by the State Archives, that would list all the groups involved in preservation or preservation education, with contact information about them.
- Funding and allocation concerns: (1) presenting clear plans of action to resource allocators is essential in garnering support, with detailed discussions of consequences should no action be taken; (2) marketing and media strategies must be put in place that emphasize the importance of preservation of our documentary heritage and the irreplaceable value of our historical resources. Promoting action and outreach was emphasized:
 - a) Those responsible for records should contact local media with potential story and article lines focusing on items in the collections.
 - b) Representatives of institutions should address civic groups to explain an organization's goals and programs and why these are important. A special emphasis should be placed on attracting young people.
 - c) Preservation awards to local supporting groups might be used to raise consciousness and engender support.
- Reformatting and migration of data to other formats: (1) critical assistance is still necessary for microfilming efforts. Because microfilming done decades ago is often substandard and cannot be digitized, repositories must test film before migrating data. Refilming original documents, if they are available, is enormously expensive; (2) some collections need digitization so that they may be accessed without damaging the originals; (3) the State Archives should take a leadership role at all levels, with educational and informational efforts to foment local support. This effort should be directed at lawmakers, local government and municipal allocators, and appropriate private foundations for needed support.

**Appendix A: *CHARTING OUR FUTURE:*
Conference Agenda
Friday, November 2, 2001**

- 8:30 - 9:00 A.M.** - **Registration**
- 9:00 A.M.** - **Welcome and Introductory Remarks** - Dr. Jeffrey J. Crow,
Deputy Secretary, N.C. Office of Archives and History (*Room 3*)
- 9:15 A.M.** - **Keynote Address - "Charting Our Future: Challenges and
Issues that Confront Us in the 21st Century"**
Governor John Carlin, Archivist of the United States
- 9:45 A.M.** - **Morning Break**
- 10:00 A.M.** - **Plenary Session Panel:**
"Electronic Records: The Challenge and Opportunity of the Inevitable"
 (Alan Kowlowitz, N.Y. State Office for Technology, Albany, N.Y.)
"Issues in Digitization: North Carolina and Beyond"
 (Kevin Cherry, The State Library of North Carolina)
"Fundraising and Resource Development: A View from the Dugout"
 (Camille Patterson, Raleigh, N.C.)
"Staff Development in the 21st Century Repository"
 (Dr. Helen Tibbo, University of North Carolina at Chapel Hill)
"The Preservation Universe: What Does it Really Mean?"
 (Harlan Greene, Charleston Public Library, Charleston, S.C.)
- 12 Noon** - **Luncheon - Guest Speaker,**
Dr. William S. Price Jr., Meredith College (*Room 2C*)
- 1:30 P.M.** - **Break-Out Sessions:**
 1) Electronic Records, Alan Kowlowitz (*Room 3*)
 2) Issues in Digitization, Kevin Cherry (*Room 7A*)
 3) Fundraising and Resource Development, Camille Patterson (*Room 7B*)
 4) Staff Development, Tim Pyatt (*Room 8A*)
 5) The Preservation Universe, Harlan Greene (*Room 8B*)
- 3:00 P.M.** - **Plenary Session - Reports from Break-Out Sessions (*Room 3*)**
- **Conference Summation –**
 David J. Olson, Director, N.C. Division of Historical Resources
- 4:30 P.M.** - **Adjournment**

Appendix B: Survey of Records Repositories: Final Results

Survey of Records Repositories — Full Analysis 10/12/01

Total Number of Surveys Received: 227

Note: When the total number of actual responses to a given question is cited, that number is used for calculating percentages. When no total is given, the total number of surveys received is used to calculate percentages.

Part B. - Institutional Information

1. Which of the following best describes your organization?
(circle one)

| | Resp | % of Total |
|----------------------------|------|------------|
| 1. Historical society | 29 | 13.2% |
| 2. College or university | 34 | 15.5% |
| 3. Public library | 18 | 8.2% |
| 4. Museum | 24 | 10.9% |
| 5. Genealogical society | 67 | 30.5% |
| 6. Corporation or business | 20 | 9.1% |
| 7. State government | 7 | 3.2% |
| 8. Other | 21 | 9.5% |
| Total | 220 | |

2. How many years has this organization had a records program for the care of archival materials?

| | Resp | % of Total |
|--------------|------|------------|
| Less than 10 | 23 | 13.0% |
| 10-49 | 80 | 45.2% |
| 50-99 | 25 | 14.1% |
| 100-199 | 21 | 11.9% |
| 200 or more | 28 | 15.8% |
| Total | 177 | |

Part C. - Collections

1. Does your organization have a written acquisition policy identifying the kinds of materials it accepts and the conditions/terms that affect these acquisitions?

1. Yes

| Resp | % of Total |
|------|------------|
| 77 | 33.9% |

2. Please identify the types of records your organization currently holds and what types you are collecting: (circle all that apply)

1. Paper records
2. Photographs
3. Architectural . . .
4. Maps, plats
5. Sound recordings
6. Video tapes
7. Motion picture film
8. Microfilm/microfiche
9. Computer media . . .
10. Optical disks
11. Other

| Resp | % of Total |
|------|------------|
| 213 | 95.9% |
| 126 | 56.8% |
| 88 | 39.6% |
| 160 | 72.1% |
| 100 | 45.0% |
| 94 | 42.3% |
| 49 | 22.1% |
| 132 | 59.5% |
| 89 | 40.1% |
| 21 | 9.5% |
| 21 | 9.5% |

Total respondents to this section 222

3. What dates are encompassed by your records? (earliest dates for bulk of collections)

- Earlier than 1700
- Between 1700 and 1800
- Between 1801 and 1900
- Between 1901 and 2001

| Resp | % of Total |
|------|------------|
| 7 | 3.4% |
| 87 | 42.2% |
| 73 | 35.4% |
| 39 | 18.9% |

Total 206

4. Please indicate which subject areas are especially strong in your collections and those in which you are focusing your acquisition efforts: (circle all that apply)

1. African Americans
2. Agriculture
3. Arts and architecture
4. Business/industry/manufacturing
5. Civil War

| Resp | % of Total |
|------|------------|
| 56 | 27.5% |
| 29 | 14.2% |
| 42 | 20.6% |
| 29 | 14.2% |
| 48 | 23.5% |

| | | |
|---|-----|-------|
| 6. Education | 50 | 24.5% |
| 7. Environmental affairs/natural resources | 24 | 11.8% |
| 8. Genealogy | 92 | 45.1% |
| 9. Labor | 75 | 36.8% |
| 10. Local history | 104 | 51.0% |
| 11. Medicine and health care | 20 | 9.8% |
| 12. Military | 51 | 25.0% |
| 13. Native Americans | 29 | 14.2% |
| 14. Politics, government, law | 35 | 17.2% |
| 15. Religion | 43 | 21.1% |
| 16. Revolutionary War | 35 | 17.2% |
| 17. Science and technology | 8 | 3.9% |
| 18. Social service/charitable organizations | 27 | 13.2% |
| 19. Transportation and communication | 25 | 12.3% |
| 20. Women | 37 | 18.1% |
| 21. Other | 49 | 24.0% |

Total respondents to this section 204

Part D. - Size of Collections

1. Paper Records: (Please indicate size in linear ft.)

| | Resp | % of Total |
|-----------------|------|------------|
| Less than 1000 | 107 | 81.1% |
| 1000-4999 | 14 | 10.6% |
| 5000-9999 | 2 | 1.5% |
| more than 10000 | 9 | 6.8% |
| Total | 132 | |

Part E. Access To Collections

1. Through which of the following are users able to locate
Descriptions of your records? (circle all that apply)

| | Resp | % of Total |
|--|------|------------|
| 1. Card catalog | 60 | 29.6% |
| 2. Typewritten registers/inventories | 158 | 77.8% |
| 3. Printed guide to whole collection | 21 | 10.3% |
| 4. Computer catalog accessible in-house | 103 | 50.7% |
| 5. Computer catalog accessible remotely . . . | 36 | 17.7% |
| 6. World Wide Web site . . . | 44 | 21.7% |
| 7. Research Libraries Information Network . . . | 5 | 2.5% |
| 8. OCLC | 25 | 12.3% |
| 9. Other regional/national automated catalog . . . | 7 | 3.4% |
| 10. Other | 42 | 20.7% |

Total respondents to this section 203

2. Are any of the following significant impediments to the use of
your records? (circle all that apply)

| | Resp | % of Total |
|--|------|------------|
| 1. Can't physically locate them | 22 | 9.7% |
| 2. Lack of indexes or other finding aids | 61 | 26.9% |
| 3. Necessary equipment not available . . . | 21 | 9.3% |
| 4. Records are deteriorated beyond use | 43 | 18.9% |
| 5. Processing backlog | 66 | 29.1% |
| 6. Other | 27 | 11.9% |

Part F. - Users

1. Estimate of average number of research requests each year in the following categories:

| | Resp | % of Total |
|--------------------|------|------------|
| 1. Regular mail | 155 | 68.3% |
| 2. Electronic mail | 96 | 42.3% |
| 3. In person | 151 | 66.5% |
| 4. By telephone | 146 | 64.3% |
| 5. None | 3 | 1.3% |

2. Please indicate for which of the following purposes your collections are used and estimate the percentage of total usage represented by each category:

| | Resp | % of Total |
|---|------|------------|
| 1. Genealogy | 135 | 76.3% |
| 2. Local history | 112 | 63.3% |
| 3. Scholarly research/publication | 85 | 48.0% |
| 4. Undergraduate class work | 65 | 36.7% |
| 5. High school/elementary school projects | 76 | 42.9% |
| 6. Property/legal research | 90 | 50.8% |
| 7. Publicity campaigns/public relations . . . | 56 | 31.6% |
| 8. Other | 50 | 28.2% |

Total respondents to this section 177

Part G. - Facilities & Equipment

1. Where are your historical records stored? (circle all that apply)

| | | |
|--------------------------|-----|-------|
| 1. Office area(s) | 141 | 62.1% |
| 2. Stack area(s) | 87 | 38.3% |
| 3. Storage room(s) | 106 | 46.7% |
| 4. Attic/closet/basement | 53 | 23.3% |
| 5. Warehouse | 21 | 9.3% |
| 6. Other | 67 | 29.5% |

2. What portion of the total storage area(s) are equipped with the following:

| | Resp | % of Total |
|---------------------------------|------|------------|
| Year-round temperature controls | 149 | 73.8% |
| Year-round humidity controls | 90 | 44.6% |

| | | |
|--|-----|-------|
| Fire detection (smoke/heat alarms) | 140 | 69.3% |
| Fire suppression (sprinklers, Halon) | 76 | 37.6% |
| Security systems (motion detectors, locks, alarms, surveillance cameras, etc.) | 127 | 62.9% |

Total respondents to this section 202

Part H. - Preservation & Conservation

1. Does your organization have a written disaster recovery plan?

1. Yes

| Resp | % of Total |
|------|------------|
| 74 | 32.6% |

2. Has your organization experienced loss of records due to any of the following during the last four years? (circle all that apply)

1. Water (floods, leaks)
2. Fire
3. Theft
4. Misfiles
5. Other

| Resp | % of Total |
|------|------------|
| 10 | 4.4% |
| 1 | 0.4% |
| 27 | 11.9% |
| 33 | 14.5% |
| 13 | 5.7% |

3. During the past year, have you undertaken any of the following preservation/conservation measures, either in-house or through an outside contractor? (circle all that apply)

1. Microfilming or other imaging
2. Rebinding/book repair
3. Document conservation/repair
4. Disaster recovery
5. Upgraded environmental controls
6. Other

| Resp | % of Total |
|------|------------|
| 97 | 42.7% |
| 87 | 38.3% |
| 73 | 32.2% |
| 10 | 4.4% |
| 21 | 9.3% |
| 24 | 10.6% |

Part I. - Staff and Volunteers

1. Please estimate how many paid staff members and volunteers work directly through your records program:

1. Paid professionals
2. Paid nonprofessionals
3. Unpaid volunteers

| Resp | Avg. FTEs |
|------|-----------|
| 158 | 7.13 |
| 56 | 2.48 |
| 62 | 2.55 |

2. In what areas and at what levels do your staff/volunteers have the greatest need for additional training? (circle all that apply)

1. Archival methods
2. Uses of computers in archives
3. Appraisal, collection development
4. Preservation/conservation methods

| Resp | % of Total |
|------|------------|
| 95 | 66.0% |
| 99 | 68.8% |
| 70 | 48.6% |
| 106 | 73.6% |

| | | |
|--------------------------|----|-------|
| 5. Disaster preparedness | 94 | 65.3% |
| 6. Other | 12 | 8.3% |

Total respondents to this section 144

Part J - Financial Support

1. Into which of the following categories does your organization's Annual spending for records fall? (include salaries, building Maintenance, utilities, etc., devoted to the management, storage, and use of these records)

| | Resp | % of Total |
|-------------------------|------|------------|
| 1. Less than \$1,000 | 36 | 23.7% |
| 2. \$1,000 - \$10,000 | 26 | 17.1% |
| 3. \$10,000 - \$50,000 | 31 | 20.4% |
| 4. \$50,000 - \$100,000 | 20 | 13.2% |
| 5. More than \$100,000 | 39 | 25.7% |
| 6. Don't know | 0 | 0.0% |
| Total | 152 | |

2. During the last 4 years, has funding for your records program: (circle one)

| | Resp | % of Total |
|--------------------|------|------------|
| 1. Decreased | 20 | 11.4% |
| 2. Remained stable | 95 | 54.3% |
| 3. Increased | 60 | 34.3% |
| Total | 175 | |

3. Over the next 4 years, do you expect funding for your program to: (circle one)

| | Resp | % of Total |
|------------------|------|------------|
| 1. Decrease | 14 | 8.0% |
| 2. Remain stable | 91 | 52.0% |
| 3. Increase | 70 | 40.0% |
| Total | 175 | |

Part K - Needs And Priorities

1. Please rank each of the following priorities for improving the Management of your records and making them available for use: (tabulating major and moderate priorities)

| | Resp | % of Total |
|---|------|------------|
| 1. Increase funding | 148 | 75.5% |
| 2. Increase capacity of storage space | 149 | 76.0% |
| 3. Improve storage conditions . . . | 126 | 64.3% |
| 4. Improve staff training or expertise | 107 | 54.6% |
| 5. Encourage greater use of collections | 87 | 44.4% |
| 6. Improve finding aids | 108 | 55.1% |
| 7. Automate description systems | 88 | 44.9% |

| | | |
|--|-----|-------|
| 8. Reformat collections . . . | 89 | 45.4% |
| 9. Develop policies/procedures for new media | 67 | 34.2% |
| 10. Develop acquisition policy/selection criteria | 60 | 30.6% |
| 11. Increase solicitation of collections | 63 | 32.1% |
| 12. Preservation/conservation of collections | 123 | 62.8% |
| 13. Develop disaster plan | 87 | 44.4% |
| 14. Process backlog of acquired collections | 94 | 48.0% |
| 15. Increase visibility of or public support . . . | 106 | 54.1% |
| 16. Other | 14 | 7.1% |

Total respondents to this section 196

2. How useful would the following cooperative efforts be to your Organization in sharing expense and/or expertise among records repositories in the state? (tabulated very and moderately useful responses)

| | Resp | % of Total |
|---|-------------|-------------------|
| 1. Statewide/multirepository automated cataloging . . . | 105 | 68.6% |
| 2. Statewide coordination of collecting policies | 89 | 58.2% |
| 3. Cooperative purchasing of archival supplies | 107 | 69.9% |
| 4. Centralized preservation/conservation lab | 121 | 79.1% |
| 5. Centralized microfilming/imaging | 116 | 75.8% |
| 6. Shared storage facilities | 63 | 41.2% |
| 7. Other | 11 | 7.2% |

Total respondents to this section 153

3. Where do you go for advice and assistance concerning your records program? (circle all that apply)

| | Resp | % of Total |
|--|-------------|-------------------|
| 1. Federal government agency | 20 | 9.9% |
| 2. State government agency | 131 | 64.5% |
| 3. Local government agency | 31 | 15.3% |
| 4. State Historical Records Advisory Board | 20 | 9.9% |
| 5. Professional organizations | 56 | 27.6% |
| 6. Colleagues in other repositories | 81 | 39.9% |
| 7. Vendors of supplies/equipment | 57 | 28.1% |
| 8. Paid consultants | 23 | 11.3% |
| 9. Other | 29 | 14.3% |

Total respondents to this section 203

Appendix C: *CHARTING OUR FUTURE:* Conference Evaluations

Participants in *Charting Our Future* were asked to complete conference evaluation forms and either turn them in before leaving at the conclusion of the afternoon sessions or mail them back to the SHRAB. Thirty-five attendees (out of 120 total) completed evaluation forms and submitted them. Responses were very positive, and a number of suggestions were made that the SHRAB will examine in its future planning activity. From the completed forms it is evident that many participants desire more sessions on the topics discussed.

The results are as follows:

1. *In general do you feel that Charting Our Future was valuable or useful to you?*

All thirty-five respondents answered "yes" to this question; a number of respondents added comments such as "valuable," "interesting," "good mix of institutions," and "presentations were very informative."

2. *Which portion of the program interested you the most?*

Some respondents listed more than one segment of the program. The break down of the forty-three responses is as follows: electronic records (ten respondents, 23%), digitization (twelve, 30%), fundraising (five, 12%), staff development (three, 7%), preservation (five, 12%), the keynote address (five, 12%), and all the segments (three, 7%).

3. *Which morning presentation was most helpful to you? For what reason?*

For the morning plenary session respondents answered: electronic records (eleven, 31%), digitization (nine, 26%), fundraising (eight, 23%), staff development (two, 6%), preservation (one, 3%), and none (one, 1%). Three respondents did not answer this question. Added explanations included: "digitization is an issue we need to master," "private funding is very important, and we need to understand what to do," and "we are dealing with electronic technology but don't really know what is happening."

4. *In your opinion, was the break-out session you attended productive? Do you feel that your discussions focused on questions that needed to be addressed?*

For this question respondents answered: yes (thirty, 86%), no (one), not certain (two), and no answer (two). Twenty responses also answered that the break-outs were "productive," "useful," "offered new insights on the material," and "addressed important questions that concern me." A number of answers included statements suggesting additional conferences, seminars, or meetings to address topics considered by the break outs.

5. *Were you able to view the allocators' cablevision program telecast over public access cable Thursday night at 8 p.m.? If so, was this program useful to you?*

Seven respondents (20%) indicated they had viewed the allocators' cablevision program. Three did not answer. Twenty-five (71%) responded that they had not seen the program.

6. *What issue that was NOT covered by the conference do you think should have been on the agenda?*

There were twenty responses to this question. Suggestions for topics that might have been covered included: digitizing newspapers, cooperative efforts between institutions, statewide goals and planning (two), standards and guidelines for preservation, electronic transmission of documents, benefits of electronic records, traditional space considerations, priorities for smaller institutions, techniques in acquiring collections, staff scheduling, legal issues, e-mail preservation, the importance of government in these efforts, the leadership role of the State Archives, and not certain (five responses).

7. *Please make any additional comments that you wish concerning "Charting Our Future."*

Nineteen responses were received. All were generally favorable, with six evaluators requesting future conferences such as *Charting Our Future*, five suggesting that such opportunities be offered more frequently, and five suggesting that the SHRAB consider holding workshops on the topics addressed.

Appendix D: List of Conference Participants

| | | |
|--|---|--|
| <p>Nancy Andersen Archivist Western NC Conf. United Methodist Church P.O. Box 18005 Charlotte, NC 28218-0005 704-535-2260 archives@wnccumc.org</p> <p>Robert Anthony Curator, NC Collections UNC Chapel Hill CB3930 Wilson Library Chapel Hill, NC 27514-8890 919-962-1172 robert_anthony@unc.edu</p> <p>Ken Badgett Historian Emeritus Old Hickory Council Boy Scouts of America 884 Rockford Road Dobson, NC 27017 336-374-4698 sckbadgett@surry.net</p> <p>Susan Ballinger Acting University Archivist UNC-CH CB#3926, Wilson Library Chapel Hill, NC 27514-8890 919-962-1345 scballin@email.unc.edu</p> <p>Mary Hollis Barnes Agency Ser. Unit Supervisor Office of Archives and History 4615 Mail Service Center Raleigh, NC 27699-4615 919-733-3540</p> <p>Chris A. Bates Carolina Room Curator/Manager Public Library of Charlotte & Mecklenburg County PLCMC-Carolina Room 310 N. Tryon Street</p> | <p style="text-align: center;">Charlotte, NC 28202 704-336-5153</p> <p>Don Beagle Belmont Abbey College 100 Belmont - Mt. Holly Belmont, NC 28012-1802 704-825-6740</p> <p>Brenda D. Bell Register of Deeds Iredell County P.O. Box 904 Statesville, NC 28687 704-872-7468 bbell@co.iredell.nc.us</p> <p>Gale Benfield Information Services Specialist Burke County Public Library 204 South King Street Morganton, NC 28655 828-437-5638 benfield@bcpls.org</p> <p>Bradley Blake Archivist Rmn Catholic Diocese of Ral. 715 Nazareth Street Raleigh, NC 27606 919-821-9708</p> <p>Jan Blodgett College Archivist Davidson College P.O. Box 7200 Davidson, NC 28035-7200 704-894-2632 jablodgett@davidson.edu</p> <p>Timothy Bottoms Museum Registrar Cape Fear Museum 814 Market Street Wilmington, NC 28401 910-341-4350ext3011 tbottoms@nhcgov.com</p> | <p>Nicole Branch Administrative Assistant Office of Archives and History 4614 Mail Service Center Raleigh, NC 27699-4614 919-733-3952 nicole.branch@ncmail.net</p> <p>Mark Brittan ASU University Archives & Records Rm 212 DD, PO Box 32019 Boone, NC 28608 828-262-4040 brittanma@apstate.edu</p> <p>Merrikay Brown Librarian Forsyth Cnty Lewisville Branch Library Lewisville Plaza Shopping Center Lewisville, NC 27023 336-945-3786 m_brown@forsyth.lib.nc.us</p> <p>Howard Burchette SHRAB Member 202 Long Crescent Drive Durham, NC 27712 919-543-0775</p> <p>Carolyn J. Burke Reference Librarian BHM Regional Library 158 North Market Street Washington, NC 27889 252-946-6401 cburke@ncsl.dcr.state.nc.us</p> <p>Fay Byrd Director Wilkes Community College P.O. Box 120 Wilkesboro, NC 28669 336-838-6289 byrdf@wilkes.cc.nc.us</p> <p>Barbara Cain</p> |
|--|---|--|

Archivist Sup.
Special Collections Branch
Office of Archives and History
4614 Mail Service Center
Raleigh, NC 27699-4614
919-733-3952

Richard Cameron
Nat'l Historical Publications
and Records Commission
Nat'l Archives & Rec.Admin.
700 Pennsylvania Avenue
Washington, DC 20408
Honorable John Carlin
Archivist of the United States
8601 Adelphi Road
College Park, MD 20740-6001

Boyd Cathey
Archivist
Office of Archives and History
4614 Mail Service Center
Raleigh, NC 27699-4614
919-733-3952
boyd.cathey@ncmail.net

Rhoda Channing
Director
Wake Forest University
P.O. Box 7777
Winston-Salem, NC 27109
336-758-5090
channing@wfu.edu

Linda Cheek
Asst. Register of Deeds
Moore County
P.O. Box 1210
Carthage, NC 28327
910-947-6370
lcheek@co.moore.nc.us

Kevin Cherry
Consultant - Special Collections
State Library of NC
4640 Mail Service Center
Raleigh, NC 27699-4640
919-733-2570

Schelley Childress
Catalog Librarian
St. Andrews Pres.College
1700 Dogwood Mile

Laurinburg, NC 28352
910-277-5044
shc@sapc.edu

David B. Chiswell
Archivist
Office of Archives and History
4614 Mail Service Center
Raleigh, NC 27699-4614
919-733-3952

Dr. Jeffrey J. Crow
Deputy Secretary
Office of Archives and History
4614 Mail Service Center
Raleigh, NC 27699-4614
919-733-7305
jeffrey.crow@ncmail.net

Paulette Cutts
NC Housing Finance Agency
3508 Bush Street
Raleigh, NC 27609

Delores S. Dameron
Register of Deeds
Caswell County Gov't
P.O. Box 988
Yanceyville, NC 27379
dsdrodcaswell@person.net

Henri T. Dawkins
Secretary
Wake County Hist. Society
2616-C Noble Road
Raleigh, NC 27608
919-833-9375

Barbara Doby
First Vice President
Hist. Soc. of South Rowan
P.O. Box 473
China Grove, NC 28023-0473
704-855-8329

Sara B. Dodd
Director, Financial Aid,
Registration and Records
Davidson Cnty Com. College
P.O. Box 1287
Lexington, NC 27293-1287
336-349-8186ext234
sdodd@davidson.cc.nc.us

Bobbie Earnhardt
Register of Deeds
Rowan County

P.O. Box 2568
Salisbury, NC 28145-2568
704-638-3102

Carolyn Evert
Librarian
Caldwell Com. College
2855 Hickory Blvd
Hudson, NC 28638
828-726-2311
cevert@caldwell.cc.nc.us

Arleen Fields
Special Collections Librarian
Methodist College
5400 Ramsey Street
Fayetteville, NC 28311
910-630-7587
afields@methodist.edu

Robert F. Fisher
Director
Robeson Cnty Public Library
P.O. Box 988
Lumberton, NC 28359
910-738-4859
rfisher@ncsl.dcr.state.nc.us

Bob Fry
Supervisor Imaging Labs
GlaxoSmithKline
5 Moore Drive
RTP, NC 27709-3398
919-483-7294
rlf39985@gsk

Gina Fry
Imaging Supervisor
Office of Archives and History
4614 Mail Service Center
Raleigh, NC 27699-4614
919-733-3952

Jeff Futch
Records Mgmt Analyst
Office of Archives and History
One Village Lane, Ste 3
Asheville, NC 28803-2677
828-274-6789

Amanda W. Garrett
Register of Deeds
Courthouse Square
Royboro, NC 27573
336-597-1733
amanda@person.net

Harlan Greene

Project Archivist
College of Charleston
133 Wentworth Street
Charleston, SC 29401

Mary H. Griffin
Conference Historian
AME Zion Church
3908 Hickory Tree Lane
Greensboro, NC 27405

Elaine N. Harmon
Register of Deeds
Lincoln County Gov't
P.O. Box 218
Lincolnton, NC 28093-0218
704-736-8534
eharmon@lincolncounty.org

Joyce B. Harshaw
Deputy III
Orange Cnty Reg. of Deeds
200 South Cameron St.
Hillsborough, NC 27278
919-245-2701
jharshaw@co.orange.nc.us

Jackie Hedstrom
Librarian II
High Point Public Library
P.O. Box 2536
High Point, NC 27261
336-883-3637
jackie.hedstrom@ci.highpoint.nc.us

Barbara Hemphill
CEO
Hemphill Productivity Instit.
1464 Garner St. Blvd #330
Raleigh, NC 27603
919-773-0722
barbara@productiveenvironment.com

Laura Hensey
Records Mgr. Analyst
Office of Archives and History
4615 Mail Service Center
Raleigh, NC 27699-4615
919-733-3540

Benjamin W. Hines
Register of Deeds
Alexander County
201 1st Street SW, Ste 1
Taylorsville, NC 28681-2504
828-632-3152
bhines@co.alexander.nc.us

Janis Holder
Asst. University Archivist
UNC Greensboro
Jackson Library, PO Bx 26175
Greensboro, NC 27402-6175
336-334-4045
janis_holder@uncg.edu

Frank Holt
University Records Manager
UNC-CH
Records Management Prog.
CB#3926
Chapel Hill, NC
919-962-6402
recman@unc.edu

Virginia Howell
Program Specialist
Page-Walker Arts & Hist. Ctr
P.O. Box 8005
Cary, NC 27512
919-462-3963
vhowell@ci.cary.nc.us

Marion Jackson
President, Board of Directors
Orange Cnty Hist'l Museum
407 Gentry Lane
Hillsborough, NC 27278
919-477-5535
clark.jackson@mindspring.com

Robert James
Director, Library Services
Wake Tech. Com. College
9101 Fayetteville Road
Raleigh, NC 27603-5696
919-662-3607
rmjames@gwmail.wake.tec.nc.us

Willoree Jobe
Register of Deeds
Yancey County
Courthouse Rm #4
Burksville, NC 28714
828-682-2174
wjobe@yancey.main.nc.us

Hal Keiner
Archivist/Historian
The Biltmore Company
One North Pack Square
Asheville, NC 28801

828-274-6270

Kay Kluttz
Curator
Hist'l Soc. of South Rowan
P.O. Box 473
China Grove, NC 28023-0473
704-857-9202

Sharon Knapp
Director of Tech. Services
Duke University
Duke Special Collections
Box 90185
Durham, NC 27708-0185
919-660-5823
sharon.knapp@duke.edu

Russell Koonts
Assistant Head
NCSU Special Collections
Box 7111 DH Hill Library
Raleigh, NC 27695
919-513-3673
russell_koonts@ncsu.edu

Sarah Koonts
Preservation Officer
Office of Archives and History
4614 Mail Service Center
Raleigh, NC 27699-4614
919-733-3952

Alan S. Kowlowitz
NY State Ofc for Technology
State Capitol, Exec. Chamber
Albany, NY 12224

Jesse R. Lankford
Asst. State Archivist
Office of Archives and History
4614 Mail Service Center
Raleigh, NC 27699-4614
919-733-3952

Gerald Lewis
Vicar General
Rmn Catholic Diocese of Ral.
715 Nazareth Street
Raleigh, NC 27606
919-821-9708

Vickie Locklear
Register of Deeds
Robeson County

P.O. Box 22
Lumberton, NC 28358

Sue Marks
Church Historian
Holy Trinity LC
P.O. Box 665
Apex, NC 27502
919-387-0824

Kenneth Marks
P.O. Box 665
Apex, NC 27502
919-387-0824

Judy D. Martin
Register of Deeds
Moore County
P.O. Box 1210
Carthage, NC 28327
910-947-6370

Della Maynor-Brown
Register of Deeds
County of Hoke
304 N Main Street
Raeford, NC 28376
910-875-2035

Deirdre R. McDonald
Student
NCCU - School of Information
& Library Science
404 Jones Ferry Road, E-20
Carrboro, NC 27510
919-929-9889
deirdrerm@mindspring.com

Becky McGee-Lankford
Records Mgmt Analyst
Office of Archives and History
4615 Mail Service Center
Raleigh, NC 27699-4615
919-733-3540

Bernard McTigue
Head of Special Collections
NCSU
Hill Library, Campus Bx 7111
Raleigh, NC 27695-7111
919-515-8119
Bernard_McTigue@ncsu.edu

Suzanne Mewborn
Info Highway Educator
NC Museum of History

833 B Daniels Street
Raleigh, NC 27605
919-834-6499
suzannemewborn@hotmail.com

David Mitchell
Asst. State Rec. Administrator
Div. of Archives and History
4615 Mail Service Center
Raleigh, NC 27699-4615
919-733-3540
david.mitchell@ncmail.net
Catherine J. Morris
State Archivist/
Records Administrator
Division of Archives and
4614 Mail Service Center
Raleigh, NC 27699-4614
919-733-3952
catherine.morris@ncmail.net

B. Perry Morrison, Jr.
NC Historical Commission
P.O. Drawer 279
Wilson, NC 27894
252-237-3153
p.morrison@narronholdford.com

Janet N. Norton
Member of NC Historical
Commission
880 Sugar Hill Road
Old Fort, NC 28762
828-668-4137

Larry Lazar Odzak
Reference Archivist
Office of Archives and History
4614 Mail Service Center
Raleigh, NC 27699-4614
919-733-3952

David Olson
Director
Div. of Historical Resources
4614 Mail Service Center
Raleigh, NC 27699-4614
919-733-7305

Ann Parkin
Membership Director
N.C. State Bar
P.O. Box 25908
Raleigh, NC 27611
919-828-4620
aparkin@ncbar.com

Camille Patterson

P.O. Box 1904
Raleigh, NC 27619

Joyce H. Pearson
Register of Deeds
Orange County
200 South Cameron St.
Hillsborough, NC 27278
919-245-2701
jpearson@co.orange.nc.us

Dr. William S. Price, Jr.
Professor of History
Meredith College
3800 Hillsborough Street
Raleigh, NC 27607-2598

Timothy Pyatt
Southern History Collection
Wilson Library/CB 3926
UNC-Chapel Hill
Chapel Hill, NC 27514

Bonnie E. Reece
Register of Deeds
Cleveland County
P.O. Box 1210
Shelby, NC 28151
704-484-4834

Linda Revels
Clerk to the Board
County of Hoke
P.O. Box 210
Raeford, NC 28376
910-875-8751

Thelda B. Rhoney
County Clerk
Catawba County
P.O. Box 389
Newton, NC 28658-0389
828-465-8209
trhoney@mail.co.catawba.nc.us

Monika Rhue
Associate Archivist
Inez Moore Parker Archives
James B. Duke Library
Johnson C. Smith University
100 Beatties Ford Rd.
Charlotte, NC 28208
704-371-6741
mrhue@jcsu.edu

Amy Rupard
Library Associate

High Point Public Library
PO Box 2530
High Point, NC 27261-2530
(336) 883-3637
amy.rupard@ci.high-point.nc.us

Margaret E. Russell
Clerk of Superior Court
Rockingham County
P.O. Box 127
Wentworth, NC 27375-0127
336-616-1991
Patricia Ryckman
Reference Archivist
UNC-Charlotte
Charlotte, NC
704-687-3408
plyckma@email.uncc.edu

Timothy R. Sanford
Assistant Provost
UNC-Chapel Hill
CB#3000, 09H South Bldg.
Chapel Hill, NC 27599-3000
919-843-7991

Dr. Loren Schweninger
Professor of History - UNCG
807 Rankin Place
Greensboro, NC 27403
336-334-3654

Wanda C. Scott
Register of Deeds
Watauga County
842 W. King Street, Suite 9
Boone, NC 28607
828-265-8057

Ann Shaw
Register of Deeds
Randolph County
P.O. Box 4066
Asheboro, NC 27204
336-318-6960
ashaw@co.randolph.nc.us

Betty Sherrill
Archives Chairman
Transylvania Cnty Joint Hist.
Preservation Commission
Rt 1, Box 287
Lake Toxaway, NC 28747
828-966-4950
raku@citcom.net

Linda Simmons-Henry
Director of Library

Saint Augustine's College
1315 Oakwood Avenue
Raleigh, NC 27610
LsHenry@st-aug.edu

Druscilla Simpson
Information Tech. Mgr. Office
of Archives and History
4614 Mail Service Center
Raleigh, NC 27699-4614
919-733-3952

Ken Simpson
Division of Archives and
History
4615 Mail Service Center
Raleigh, NC 27699-4615
919-733-3952

Patrice L. Slattery
Archivist
NC School of the Arts
P.O. Box 12189
Winston-Salem, NC 27117
336-770-3272
slatteryp@mail.ncarts.edu

Ed Southern
Division of Archives and
4614 Mail Service Center
Raleigh, NC 27699-4614
919-733-3952

Benjamin Speller
Dean
NCCU School of Information
& Library Science
1004 Shepherd Street
Durham, NC 27707-1328
919-530-7438
speller@slis.nccu.edu

Kathryn Staley
Archivist I
Appalachian State University
Belk Library, ASU
Boone, NC 28608
828-262-6724
staleykl@appstate.edu

Maxine Stokes
Records Mgmt. Analyst
Office of Archives and History
4615 Mail Service Center
Raleigh, NC 27699-4615
919-733-3540

Muriel E. Tarpley

Register of Deeds
Alamance County
P O Box 837
Graham, NC 27253
336-570-6565
Muriel.Tarpley@alamance-nc.com

Traci Thompson
Local History
Reference Librarian
Edgecombe County
Memorial Library
909 Main Street
Tarboro, NC 27822
252-823-1141
tthompson@edgecombelibrary.org

Dr. Helen Tibbo
Frances Carroll McColl
Term Professor
School of Information and
Library Science
UNC-Chapel Hill
201 Manning Hill CB#3360
Chapel Hill, NC 27599-3360

Talecia Townsend
Student
NCCU
901 Chalk Level Road Apt E7
Durham, NC 27704
Talecia@hotmail.com

Fred J. Vatter
President & Museum Curator
Chatham County Hist'l Assoc.
586 Fearington Road
Pittsboro, NC 27312
919-542-0270

Linda M Wann
Records Manager
Meredith College
3800 Hillsborough Street
Raleigh, NC 27607
919-760-2882
wannl@meredith.edu

Deborah Webb
Local History Librarian
Wilson County Public Library
P.O. Box 400
249 W. Nash Street

Wilson, NC 27894-0400
252-237-5355
dwebb@wilson-co.com

Ronny Welborn
Police Records Administrator
Greensboro Police Dept
PO Box 3136
Greensboro, NC 27402-3136
336-373-2411
ronny.welborn@ci.greensboro.nc.us

Kim Wetmore
Catawba County Library
Associate Librarian
115 West C Street
Newton, NC 28658

Lisa White
NC Housing Finance Agency
3508 Bush Street
Raleigh, NC

Kandace Whitehead
Register of Deeds
Columbus County
P.O. Box 1086
Whiteville, NC 28472
910-640-6625
ccdeeds@weblnk.net

Jennifer Leggett Whitehurst
Register of Deeds
Beaufort County
P.O. Box 514
Washington, NC 27889
252-946-2323
djleggett_1999@yahoo.com

Jean F. Williams
Head, Public Services Division
NC A&T State University
1601 E Market Street
Greensboro, NC 27411
336-334-7618
williamj@ncat.edu

Patricia Williams
City Clerk
City of Hickory
PO Box 398
Hickory, NC 28603
828-323-7413
pwilliams@ci.hickory.nc.us

Ann Wright
Special Collections Librarian
Asheville-Buncombe Library

67 Haywood Street
Asheville, NC 28801
828-255-5203
awright@ablsys.abls.lib.nc.us

Helen H. Wykle
Librarian
UNC-Asheville
1 University Heights
Asheville, NC
828-251-6621
hwykle@bulldog.unca.edu
Terri S. Yates
Chairperson
Computer Tech and Info Sys.
Davidson Cnty Com. College
P.O. Box 1287
Lexington, NC 27293-1287
336-244-8186 ext788
tyates@davidson.cc.nc.us

Susan E. Zolkowski
Branch Mgr/Archivist
Olivia Raney History Library
4016 Carya Drive
Raleigh, NC 27610
919-250-1229
szolkowski@co.wake.nc.us

David Zonderman
Associate Professor of History
NC State University
P.O. Box 8108
Raleigh, NC 27695
919-513-2222
zonderman@social.chass.ncsu.edu

Appendix E: List of SHRAB Members

Dr. Jeffrey J. Crow, Director
Division of Archives & History
4610 Mail Service Center
Raleigh NC 27699-4610
(919) 733-7305
jcrow@ncsl.dcr.state.nc.us

Catherine J. Morris
State Archivist and Records Administrator
Division of Archives and History
4614 Mail Service Center
Raleigh NC 27699-4614
(919) 733-3952
cmorris@ncsl.dcr.state.nc.us

Howard Burchette
202 Long Crescent Drive
Durham NC 27712
(o) 919-543-0775 (h) 919-471-1429
hbhoward@us.ibm.com

Dr. George-Anne Willard
PO Box 179
Louisburg NC 27549
(919) 496-2521
WillardGA@aol.com

Timothy Pyatt
Southern Historical Collection
Wilson Library/C.B. 3926
UNC-Chapel Hill
Chapel Hill NC 27514
tpyatt@email.unc.edu

Rhoda K. Channing
Director
Z. Smith Reynolds Library
Wake Forest University
Winston-Salem NC 27109-7777
channing@wfu.edu

David J. Olson
Deputy Director, Division of Archives & History
4610 Mail Service Center
Raleigh NC 27699-4610
(919) 733-7305
dolson@ncsl.dcr.state.nc.us

Hal Keiner
Archivist/Historian
The Biltmore Company
One North Pack Square
(828) 274-6270 ext 320
hkeiner@biltmore.com

Dean Benjamin Speller
Dean, NCCU School of Information & Library Science
1004 Shepherd Street
Durham NC 27707-1328
speller@slis.nccu.edu
Dr. Loren Schweninger
Professor of History—UNCG
807 Rankin Place
Greensboro NC 27403
(336) 334-3654
lschwen@hamlet.uncg.edu

Appendix F: Reports of Consultants

Electronic Records Outreach Program:

Final Report

To the North Carolina State Historical Records Advisory Board (SHRAB) and to the National Historical Publications and Records Commission (NHPRC)

This brief report summarizes the various activities and services provided by Alan S. Kowlowitz, consultant to the North Carolina State Historical Records Advisory Board's Electronic Outreach Program. The North Carolina Department of Cultural Resources (NCDCCR) administered this program and the National Historical Publications and Records Commission (NHPRC) funded it. The activities described in the report include all activities specified in the consultant's original plan of work for the project as well as additional activities agreed to by the consultant and NCDCCR. The report also contains an appendix listing all project deliverables and products provided by the consultant. All products are available from the consultant or NCDCCR.

In preparing for the project, the consultant conducted an environmental scan of North Carolina state and local government. Among other factors, this scan identified:

- Important organizational players and their relationship to the NCDCCR in areas most relevant to electronic records management, including information resource management and information policy.
- North Carolina laws relevant to records, including recent laws and regulations having an impact on electronic records programs.

In conducting the environmental scan the consultant reviewed materials of the Office of Archives and Records' electronic records program, North Carolina's general records laws and recently passed electronic signatures and records laws, North Carolina's electronic government portal "NC@yourservice," as well as the websites of the Department of Cultural Resources, Department of the Secretary of State, and the Office of Information Technology Services, and key electronic government reports and documents.

The consultant reviewed the make-up of representatives attending *Charting Our Future: The Statewide Conference on Records* and their needs with David Mitchell, Assistant State Records Administrator, as well as additional services that could be provided during the first site visit. He prepared in advance a Power Point slideshow and a facilitation plan for the statewide records conference. These were shared with Archives and Records Section staff and modified based on their comments.

On the afternoon of November 1, after arriving in Raleigh, the consultant had brief introductory meetings with Catherine Morris, State Archivist and Records Administrator, and David Olson, director of the Division of Historical Resources. He also facilitated an informal two-hour meeting with selected managers and staff of the Archives and Records Section. This meeting focused on the division's electronic records program and general electronic records program development issues. Topics discussed included staff development, organizational structures, restructuring resources, and program focus. A number of points made during the session included the following:

- Electronic records need to be integrated into ongoing operations, and all records analysts and archivists need to have some minimal competencies in dealing with them.
- Electronic records programs also need some specific and dedicated resource support, as well as aggressive leadership to be successful.

- The task of addressing electronic records issues is immense and will require modification of traditional records management and archival methods.
- Limited resources may require electronic records programs to have a specific focus, which determines how they expend resources on electronic records. For example, a state records program could decide to concentrate on electronic records of long-term value or on those with exceptional resource value, limiting the resources expended on electronic records with limited value.

The consultant presented at the opening plenary session of *Charting Our Future: The Statewide Conference on Records*. His presentation, titled “Electronic Records: The Challenge and Opportunity of the Inevitable,” provided a brief overview of information technology, digital government, and electronic records issues. He discussed how advances in technology and changes in providing government services are making electronic records the preferred vehicle to conduct and document government business. Special attention was paid to electronic government, which has been an impetus for major legal changes affecting electronic records. The consultant discussed the technological and organizational issues involved in effectively managing and preserving electronic records as well as ways to address these issues.

In the afternoon the consultant facilitated a break-out session attended by local government, university, and state government officials as well as NCDRC staff. During the discussion, the consultant employed a number of techniques to help attendees identify the following:

- Barriers to effectively managing electronic records.
- Strategies to overcome barriers or address issues.
- Existing resources to address electronic issues.

In a follow-up to the records conference, the consultant produced a three-page written summary of his comments given at the morning plenary session.

In preparation for on-site work on December 4 and 5, the consultant developed with David Mitchell a list of questions to be used for the OPEN/net cable broadcast program on electronic records scheduled for the evening of December 4. The consultant also offered to provide a workshop on Public Key Infrastructure (PKI) to Archives and Records Section staff and managers. PKI provides the institutional, policy, and technology framework that will support authentication, digital signing, integrity, and encryption of electronic records transported over the Internet. PKI poses challenges for records and archival institutions, but also provides opportunities for cross-organizational cooperation and creating new roles for those institutions. It was agreed that a PKI workshop would be presented on the afternoon of December 4. The consultant developed the workshop to fit into a two-hour timeframe. The workshop provided a primer on PKI and discussed issues that PKI raises for archivist and records managers, with specific reference to the North Carolina state government context.

During the afternoon of December 4, the consultant delivered the PKI workshop to selected Archives and Records Section professional and managerial staff. Prior to the December 4 telecast, the consultant, along with other panelists, met with the staff of the North Carolina Agency for Public Telecommunications (NCAPT) to review and revise the script for the broadcast, which aired during the 8:00-9:00 p.m. timeframe. NCAPT produced a videotape of the broadcast, which NCDRC or NCSHRAB could use for further training and advocacy purposes.

On the morning of December 5, the consultant met with David Mitchell and Ed Southern, Records Management Analyst Supervisor, to discuss the Archives and Records Section’s proposed electronic records survey form and approach. The consultant provided a critique of the form and suggestions for improving the approach to surveying electronic records.

All activity planned in the consultant’s project proposal was complete with the conclusion of the December 4-5, 2001 site visit.

List of Project Deliverables and Products:

- Led a discussion session of electronic records program development issues with selected Archives and Records Section staff and managers.
- Offered a presentation at *Charting Our Future: The Statewide Conference on Records*, titled “Electronic Records: The Challenge and Opportunity of the Inevitable,” including Power Point slideshow and written narrative summary of comments.
- Facilitated a break-out session at *Charting Our Future: The Statewide Conference on Records* on “Electronic Records,” including recommendations.
- Presented a “Public Key Infrastructure (PKI): A Primer for Records Professionals” workshop, including Power Point slideshow and handouts.
- Participated in an OPEN/net cable broadcast discussion “Electronic Records,” including the preparation of a list of pertinent questions.
- Reviewed and offered oral comments on Archives and Records Section’s electronic records survey form and procedures.

Alan S. Kowlowitz, Consultant, NCSHRAB Electronic Records Outreach Program

**Issues in Digitization:
Final Report
To the North Carolina State Historical Records Advisory Board (SHRAB) and to
the National Historical Publications and Records Commission (NHPRC)**

Digitization, the process by which information is made computer compatible, carries great promise for information managers, among them archivists, librarians, and registers of deeds. Digitization also offers a great many challenges.

Under the terms of a 1999 grant from the National Historical Publications and Records Commission (NHPRC) to the North Carolina State Historical Records Advisory Board (SHRAB), Kevin Cherry, consultant for special collections in the State Library of North Carolina and project director of the North Carolina ECHO Project, was asked to participate in a public access cable television call-in show (which has subsequently been rebroadcast several times) on "Issues in Digitization," telecast October 23, 2001, and a day-long statewide conference on records, *Charting Our Future*, held on November 2, 2000, and to share his understanding of digitization issues. Conclusions reached during the television program and conference were compatible with some of the major trends identified by Cherry during his several years working with the federal grant-funded North Carolina ECHO, "Exploring Cultural Heritage Online," the statewide access to special collections and digitization project managed by the State Library of North Carolina.

Finding 1. Expectations High

Among the general population expectations for the possibilities of computer-based information are sometimes very unrealistic. Calls to the public access television show and questions from participants during the day-long conference reflected this fact. Led by popular culture to believe that all types of information can be found by simply typing the right combination of words into an Internet search box, users of the state's archives, libraries, and records centers regularly ask the custodians of the state's memory "How can I see this on my desktop at home?" and "When will it *all* be online?" There is a growing chorus of discontent among some of the most avid users of the state's research centers, and much of this discontent flows from a misunderstanding concerning what is involved in a digitization effort on the grand scale, an effort that in addition to holding huge numbers of images must be sustained for extended periods of time and be interoperable with other library and archive information management systems. It is not among users alone that this misunderstanding exists. There seems to be a belief among some managers (ones removed from the technical and day-to-day concerns of their operations) that digitization will, through automation, save the institution labor and space, and thus money. A cursory investigation and extensive anecdotal evidence seem to suggest that, at least in the early stages of this digital revolution, this is not yet the case.

Finding 2. Digitization Builds Upon Traditional Activities

Digitization is not currently recognized as a preservation activity, but as an access activity. It will more than likely remain simply a set of procedures aimed at providing greater access to materials until that time in which a series of processes and storage media are developed that will equal the longevity and ease of use of microfilm. Until that point is reached, the original analog copy must still be preserved. And even then, those future stewards of the past may still wish to maintain the original records for their artifactual value. This means that all traditional preservation measures must still be employed. Far from digitization requiring less arrangement and description of originals, in most instances it requires much more arranging, indexing, and cataloging. Where once the archivist may have been satisfied with folder lists, giving users the responsibility of thumbing through the pages found inside, the archivist when digitizing that folder must have control over *each* of the pages within, because each page will be individually scanned

and presented to the user. Simply put, digitization is not a replacement activity, but rather a set of processes that builds upon the traditional work of librarians and archivists. It is also a labor-intensive set of processes. Participants in the day-long conference, many of whom are involved in or are beginning to plan digitization projects, seemed to feel that these facts were not clearly understood by their users and some managers.

Finding 3. Promises Cannot Be Ignored

Expectations for digitization are high for a reason. What researcher, no matter his subject, would not want to have easy access to the primary sources of the state's archives and libraries, no matter where they might be located? What cultural caretaker would not want to place valuable, highly fragile, original records into preservation enclosures while asking their users to work with digital surrogates? What public historian would not be excited about the possibility of creating virtual exhibits, using items that are geographically separated but thematically related, to illustrate some important aspect of a historic site or reenactment? What teacher would not welcome the possibility of incorporating historical evidence into classroom activities? Digitization is the answer for these researchers, cultural caretakers, public historians, teachers, and a great many others. Its promise cannot be ignored. This was the overarching message of the statewide conference. As one manager of a digital project said during a breakout session to her colleagues considering digitization: "Do something. You've got to *do* something. Just get started."

So how to proceed?

Potential Action Item 1: Continuing Education Program

It is evident that the cultural caretakers from around the state could benefit from a comprehensive and in-depth, hands-on continuing education program. A program containing an overview of digitization concerns could also be presented to a wide range of employees from the state's cultural agencies, technical and otherwise, to build a solid base of understanding about issues involved in digitization. The same overview could be offered in a series of outreach efforts to the state's historical and genealogical societies, who are some of the most avid users of the state's research materials.

Potential Action Item 2: Selection, Criteria, and Prioritization

The resources do not presently exist to digitize all of the state's archival holdings. Selection criteria for those items to be digitized could be created and prioritized based upon user needs, institution goals, condition of originals, allocated resources, and so on. This selection criteria and priority list (with cost estimates computed for various series and sub-series of records or collection groups) could then be shared with those segments of the public most vocal in calling for greater amounts of online materials. While educating non-professionals about digitization activities and costs, these priority lists could also act as benchmarks for institutions pursuing greater access to their materials.

Potential Action Item 3: Production-Level Facility

To reach production-level digitization, a production-level facility and staffing must be created. It is possible to outsource some portions of digitization projects, but the core tasks of arrangement, description, quality control, cataloging and the like will, in all likelihood, still be the work of those professionals most familiar with the content and context of those materials being digitized. In addition, digitization will be an ongoing process. It is not a set of procedures that can be performed once and pronounced finished. Digital products must be actively monitored, migrated, and backed-up—not to mention added to. Cultural repositories in the state may wish to begin considering the creation of a digitization unit to act as a resource for agencies throughout the state.

Potential Action Item 4: Outreach to Managers of Records at the Local Level

Currently, many of the caretakers of records on the county and local level are exploring and purchasing digital imaging systems that, in a great many cases, are not interoperable. It is feared that in some cases, these records, carrying information of great importance, might actually be locked into proprietary systems and may not be sustainable over time. This issue could be addressed through a future conference or session at which these issues are addressed by the local caretakers themselves, and where some goals and areas for action can be identified by those who will bear the impact of their decisions.

Potential Action Item 5: Modeling of Interoperability Across Institution Types

We are a multi-media culture, and users of cultural institutions are increasingly seeking information on subjects across media types. In other words, if a researcher is interested in the Salisbury Confederate Prison, that researcher will be interested in seeing reproductions of artifacts from that prison (for example the flag that flew over it, which is held by the North Carolina Museum of History), or drawings of the prison grounds (such as the lithograph held by the Photo Archives at UNC-CH's North Carolina Collection), or manuscript items (such as the prison diary held by Rowan Public Library), or, perhaps, video and audiotapes (like those taken of reenactors and speakers at the Salisbury Confederate Prison Symposium and held by the Robert F. Hoke Chapter of the United Daughters of the Confederacy) or printed items (such as the memoirs of prisoners that are held by a number of libraries across the state).

In the digital age, interoperability means more than archival management systems being able to “speak” or share information with non-archival systems. It means more than being able to cross-search library catalogs. It means allowing the user to look for related items across museum registration records, through library catalogs, and in manuscript collection finding aids—all in one search. Very few such systems of interoperability exist. There is a reason why museums, libraries, and archives describe their holdings in specific ways. Their users often have different information needs. It might be important for a researcher to know the dimensions of a work of art, while that same researcher might have no interest in the size of the artist's biography. Because each type of institution has a different set of users with their own needs, each institution type has evolved its own standard vocabulary. A library might give a cookbook a subject heading of “domestic cooking,” while a history museum might call the same cookbook something else. Building a system of interoperability, then, means more than the purchase and adaptation of hardware and software. It would involve looking at arrangement and description, cataloguing, and registration practices as well. Because North Carolina does not exist in a vacuum, it would also involve making sure that activities undertaken in the Tar Heel State would interact with similar systems being developed nationally. The Department of Cultural Resources could begin to explore such a system of interoperability as a part of the records digitization efforts of the state of North Carolina, cataloguing and indexing to allow for greater contextualization of the holdings of individual institutions and to provide a richer research environment to the citizens of the state.

Based upon the concerns voiced during *Charting Our Future* and developed in the cablevision broadcast, coupled with an understanding of digitization issues confronting North Carolina institutions, these potential action items are arranged in the order of their level of challenge. They represent one set of responses to these concerns. They will require the investment of additional resources. Some will involve, perhaps, a great deal of additional resources, but those additional resources will bring the records of the people of North Carolina to the people of North Carolina. This is a goal well worth the pursuit. As the conference participant stated, “Do something. You've got to *do* something. Just get started.”

With the participation in the SHRAB cablevision program and in *Charting Our Future* and its recommendations, and this resulting report, this consultancy was completed.

Kevin Cherry, Consultant, NCSHRAB Issues in Digitization Project

